<u>Workplans</u> in CATALYST
https://fortress.wa.gov/doh/catalyst

Menu Location: CONTRACT MANAGEMENT – CONTRACTOR – WORK PLANS

Purpose:
- ❑ Outlines "Planned Activities" for the contract year
- ❑ Allows other users to view local program plans
- ❑ Documents program workplans by year and provides a historical perspective

Which reports display WORKPLAN information in CATALYST?

- ❑ **Planned Activities**
  - Who is doing a particular activity with a particular group (e.g. Hispanic/Latino, etc.)?
  - What is a particular contractor doing overall?
- ❑ **Planned Activities Detail**
  - What is the entire workplan for my organization?
- ❑ **Contract Plan Worksheet**
  - How can I start planning to implement my workplan activities?
- ❑ **Statewide Activity Summary**
  - What are a few other counties that "look like me" doing in their workplans?
  - How many ESD programs in the state are working with Project ALERT?
  - * This report has a "key" at the bottom to identify which ESD, Community, or Tribal Organization is represented by each column
- ❑ **Subcontractor Activity Summary**
  - Which of my subcontractors are doing which activities?
  - How many subcontractors are doing a particular activity?

Frequently Asked Questions (FAQs):

Q: When do I enter a workplan in CATALYST?
A: Workplans are entered in CATALYST one time during the spring for the upcoming fiscal year. Contract Managers will announce due dates and provide instructions.

Q: If my workplan changes during the year how do I make changes?
A: After the workplan due date contract managers will "lock" the workplan in CATALYST. To make changes contractors must notify and discuss modifications with their appointed contract manager.

Q: Who can view my workplan information?
A: All users can view "planned activities" (workplans) by generating any of the reports listed above. Outputs or "actual activities" can only be viewed by the reporting agency.

How to Enter Your <u>Workplan</u> into CATALYST
https://fortress.wa.gov/doh/catalyst

Step 1: Login to CATALYST – A successful login will open the message screen
(An unsuccessful login will give you a 'login failed' message in red)

Step 2: From the toolbar at the top of the screen
- ❑ Select **CONTRACT MANAGEMENT – WORK PLANS**

Step 3: The **FIND PLANNED ACTIVITY** screen will appear
- ❑ Check to see if the **CONTRACTOR** field is populated with your agency (If not, use the contractor drop down menu to select your agency) **&**
- ❑ Click **NEW** (Clicking **FIND** will find all planned activities for your workplan)

Step 4: The **WORKPLAN** screen will appear
- ❑ The header indicates Contractor and Year for the workplan
- ❑ Select an **GOAL** from the Goal drop down menu
- ❑ Select an **ACTIVITY** from the Activity drop down menu
- ❑ Write an **ACTIVITY DESCRIPTION** for your Goal/Activity combination
- ❑ Click **NEXT**

Step 5: The **AUDIENCE** screen will appear
- ❑ Give an **AUDIENCE DESCRIPTION**
- ❑ Select at least one selection criteria option from the drop down menus
- ❑ Indicate the **ESTIMATED NUMBER TO REACH**
- ❑ Click **UPDATE**
- ❑ The newly defined Audience will appear below the selection criteria
- ❑ To define another Audience for the same Goal/Activity combination
- ❑ Click **NEW** and repeat Step 5
- ❑ For more information on defining audiences please refer to the <u>Target Audience</u> reference document on the Contractor Resources Website

Step 6: Click **SAVE**
- ❑ CATALYST will return you to the **FIND PLANNED ACTIVITY** screen
- ❑ A message will appear in the header to confirm your workplan entry was saved
- ❑ You can view your entry at the bottom of the Workplan screen under **Select a Planned Activity**
- ❑ Repeat the steps above to add additional Goal/Activity combinations to your workplan